

# Post ERA Payments

Last Modified on 04/01/2022 4:12 pm EDT

Version 20.16

**Path: Billing tab > Billing Center button > ERA Payments tab > Unposted radio button**

**Path: Main Navigation Panel > Remits**

## About

After you've **fetched and processed** Adjudications into OP, you're ready to post ERA payments. ERA payment posting is completed from the ERA Payments tab of the Billing Center, which can be filtered by Posting Status: All, Unposted, Out of Balance, or Override Performed. Filtering by **Unposted** and sorting the grid by **Payer Name** is the most common window setup for ERA posting, so the workflow below assumes your window is set up in this way.

## Post ERA Payments

1. Navigate to the **Unposted** ERA payments by following one of the paths above.
2. Click **+** next to a selected Payer to expand the list of ERA payments.
3. Locate the **ERA** that you want to post. The Payment Amount, Posted Payments, and Unposted Payments are displayed.



**Note:** ERAs are highlighted in yellow when there is a difference that is causing the Posted Payments and the Unposted Payments to not equal the Payment Amount. An example of where you will see this is in the case of a recoup. It is recommended that these ERAs be investigated to determine what is causing the difference **prior** to posting any payments on that ERA, as there may be several adjudications that must be discarded.

4. Click the **blue hyperlink** in the Unposted Payments column. The Adjudications tab opens with the transactions for that ERA populated. With the Claims collapsed, you can see the claim processing details, including the **Claim Status**, which tells you how the claim was processed by the Payer, such as Primary, Secondary, Denial, or Reversal.
5. Click **+** located to the left of each Claim Number to expand the adjudication details for each claim.
6. Review each adjudication line. You'll want to review:
  - Allowable, Payment, and Adjustment amounts for each CPT code. To assist with your review, you can hover over the CPT code to see its description.
    - For secondary payments, OP automatically sorts the previous adjustment for when the primary payment was made and applies the additional payment appropriately.
  - Adjustment Reason(s)
  - Patient Responsibility amount(s)
  - Patient Action: Your options are:
    - **Hold on Account:** Default selection where the balance will be held until statements are generated.
    - **Create Statement:** A statement is automatically sent to the Statement Queue.
    - **Autopay with PC:** The balance is automatically paid with the patient's credit.



**Note:** If your Practice uses Instamed Merchant Services to process credit card payments, credit cards are saved on file, and the global preference to exclude CC on file from the Patient Action list is unchecked (**Admin tab > Global Preferences > Billing tab > Administration tab**), these options are also available:

- **Autopay with PC + CC** (Instamed Merchant Services Only): The balance is paid with a combination of patient credit and the credit card saved on file. This option is only visible if a credit card is saved on file.
- **Autopay with CC** (Instamed Merchant Services Only): The balance is paid with the credit card saved on file. This option is only visible if a credit card is saved on file.

- After reviewing the details of each adjudication, edit the **Match Status**, if necessary. Be sure to select **Discard** for any adjudications that should not be posted to the patient's claim or that will be manually posted to the claim. To see a list of available Match Statuses and their meanings, click [here](#). In addition to the Match Status meanings, you'll also learn about how you can default them to automatically populate on adjudications processed into OP.

**Tip:** The default Match Status and Auto-Approval may be edited to streamline your ERA posting. It is recommended to take note of the defaults that are already in place before making any changes. When ready to do so, the following may be changed:



- Match Status** (as referenced above): The default Match Status for the Insurance Adjustment Reason may be edited in the HIPAA Code table (**Billing tab > More button (Reference Data group) > HIPAA Codes**).
- Auto-Approval for Matched Adjudications:** The auto-approval of Matched Adjudications can be enabled or disabled in System Preferences (**Admin tab > Global Preferences > Billing tab**).

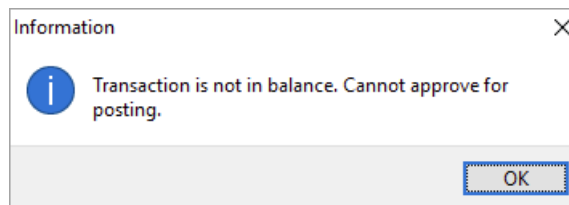
- Select the **Aprvd** (approved) checkbox (if not already selected). All adjudications with the Aprvd checkbox selected will be posted once Post Paymt is clicked (in the next step).

**Note:** Individual transactions whose **Aprvd** checkbox is highlighted in yellow indicate that posting the transaction will cause the claim line to be out of balance. **These transactions cannot be approved with a Match Status of *Matched***. By default, the Match Status is set to **Discard**. Transactions identified in yellow must be manually posted to the claim.

<input checked="" type="checkbox"/>	847762	Processed as Primar: 99173	08/13/2020	1	(55.00)	(2.12)	(51.47) 45: Charges exc
		<b>Discard</b> VISUAL ACUITY SCREEN					(1.41) 2: Coinsurance /



If you attempt to change the Match Status from Discard to Matched, you will receive the following message. You must return the Matched Status to Discard before being able to approve the transaction for posting.



- Click the **Post Paymt** button.
- Click the **Yes** button in the confirmation window. The approved payments are posted.



- Ensure your posted payments **balance** to the amount of the ERA (provided you have no manual posting to complete).

Version 20.15

**Path: Billing tab > Billing Center button > ERA Payments tab > Unposted radio button**

**Path: Main Navigation Panel > Remits**

About

After you've **fetched and processed** Adjudications into OP, you're ready to post ERA payments. ERA payment posting is completed from the ERA Payments tab of the Billing Center, which can be filtered by Posting Status: All, Unposted, Out of Balance, or Override Performed. Filtering by **Unposted** and sorting the grid by **Payer Name** is the most common window setup for ERA posting, so the workflow below assumes your window is set up in this way.

## Post ERA Payments

1. Navigate to the **Unposted** ERA payments by following one of the paths above.
2. Click **+** next to a selected Payer to expand the list of ERA payments.
3. Locate the **ERA** that you want to post. The Payment Amount, Posted Payments, and Unposted Payments are displayed.



**Note:** ERAs are highlighted in yellow when there is a difference that is causing the Posted Payments and the Unposted Payments to not equal the Payment Amount. An example of where you will see this is in the case of a recoup. It is recommended that these ERAs be investigated to determine what is causing the difference **prior** to posting any payments on that ERA, as there may be several adjudications that must be discarded.

4. Click the **blue hyperlink** in the Unposted Payments column. The Adjudications tab opens with the adjudications (or transactions) for that ERA populated. With the Claims collapsed, you can see the claim processing details, including the **Claim Status**, which tells you how the claim was processed by the Payer, such as Primary, Secondary, Denial, or Reversal.
5. Click **+** located to the left of each Claim Number to expand the adjudication details for each claim.
6. Review each adjudication line. You'll want to review:
  - Allowable, Payment, and Adjustment amounts: For secondary payments, OP automatically sorts the previous adjustment for when the primary payment was made and applies the additional payment appropriately.
  - Adjustment Reason(s)
  - Patient Responsibility amount(s)
  - Patient Action: Your options are:
    - **Hold on Account:** Default selection where the balance will be held until statements are generated.
    - **Create Statement:** A statement is automatically sent to the Statement Queue.
    - **Autopay with PC:** The balance is automatically paid with the patient's credit.



**Note:** If the practice uses Instamed Merchant Services to process credit card payments, credit cards are saved on file, and the global preference to exclude CC on file from the Patient Action list is unchecked (Admin tab > Global Preferences > Billing tab > Administration tab), these options are also available:

- **Autopay with PC + CC** (Instamed Merchant Services Only): The balance is paid with a combination of patient credit and the credit card saved on file. This option is only visible if a credit card is saved on file.
- **Autopay with CC** (Instamed Merchant Services Only): The balance is paid with the credit card saved on file. This option is only visible if a credit card is saved on file.

7. After reviewing the details of each adjudication, edit the **Match Status**, if necessary. Be sure to select **Discard** for any adjudications that should not be posted to the patient's claim or that will be manually posted to the claim. To see a list of available Match Statuses and their meanings, click [here](#). In addition to the Match Status meanings, you'll also learn about how you can default them to automatically populate on adjudications processed into OP.



**Tip:** The default Match Status and Auto-Approval may be edited to streamline your ERA posting. It is recommended to take note of the defaults that are already in place before making any changes. When ready to do so, the following may be changed:

- **Match Status** (as referenced above): The default Match Status for the Insurance Adjustment Reason may be edited in the HIPAA Code table (**Billing tab > More button (Reference Data group) > HIPAA Codes**).
- **Auto-Approval for Matched Adjudications:** The auto-approval of Matched Adjudications can be enabled or disabled in System Preferences (**Admin tab > Global Preferences > Billing tab**).

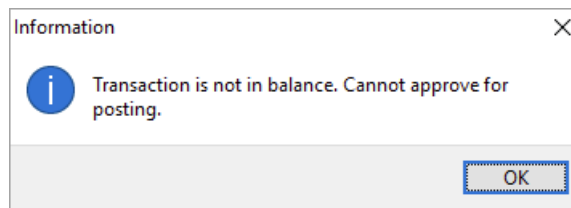
- Select the **Aprvd** (approved) checkbox (if not already selected). All adjudications with the Aprvd checkbox selected will be posted once Post Paymt is clicked (in the next step).

**Note:** Individual transactions whose **Aprvd** checkbox is highlighted in yellow indicate that posting the transaction will cause the claim line to be out of balance. **These transactions cannot be approved with a Match Status of *Matched*.** By default, the Match Status is set to **Discard**. Transactions identified in yellow must be manually posted to the claim.

<input checked="" type="checkbox"/>	847762	Processed as Primar: 99173	08/13/2020	1	(55.00)	(2.12)	(51.47) 45: Charges exc
		<b>Discard</b> VISUAL ACUITY SCREEN					(1.41) 2: Coinsurance /



If you attempt to change the Match Status from Discard to Matched, you will receive the following message. You must return the Matched Status to Discard before being able to approve the transaction for posting.



- Click the **Post Paymt** button.
- Click the **Yes** button in the confirmation window. The approved payments are posted.



- Ensure your posted payments **balance** to the amount of the ERA (provided you have no manual posting to complete).